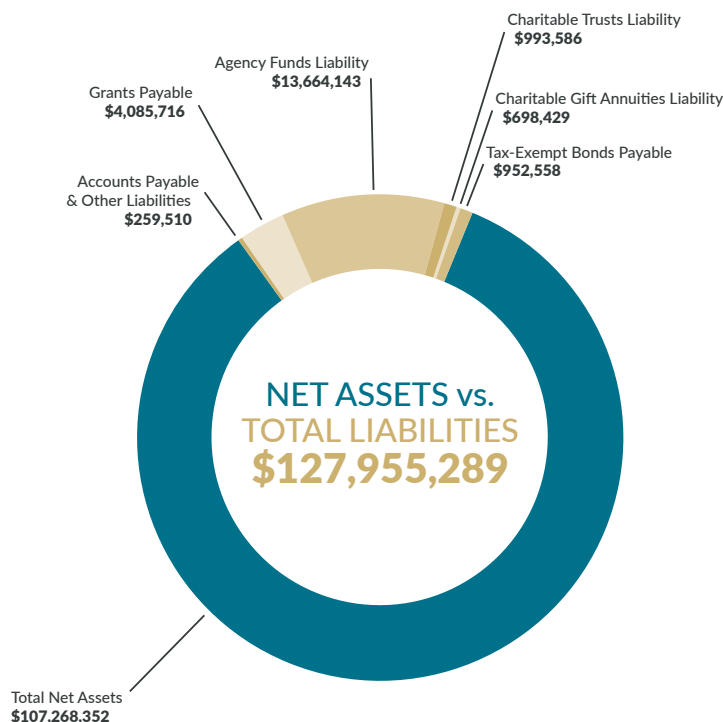
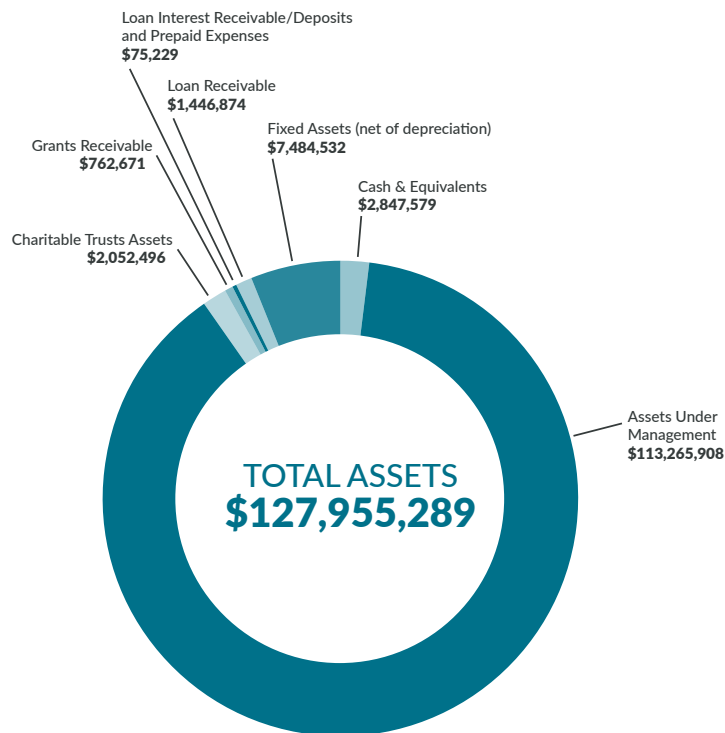


Financial Highlights

STATEMENT OF FINANCIAL POSITION Fiscal Year Ending December 31, 2018

ASSETS

Cash & Equivalents	\$2,847,579
Investments at Fair Market Value	\$113,265,908
Charitable Trusts Assets	\$2,052,496
Grants Receivable	\$762,671
Loan Receivable	\$1,466,874
Deposits and Prepaid Expenses	\$75,229
Fixed Assets (net of depreciation)	\$7,484,532
TOTAL ASSETS	\$127,955,289



LIABILITIES

Accounts Payable & Other Liabilities	\$259,510
Grants Payable	\$4,085,716
Agency Funds Liability	\$13,664,143
Charitable Trusts Liability	\$993,586
Charitable Gift Annuities Liability	\$698,429
Tax-Exempt Bonds Payable	\$952,558

TOTAL LIABILITIES **\$20,686,937**

TOTAL NET ASSETS **\$107,268,352**
TOTAL LIABILITIES & NET ASSETS **\$127,955,289**

Board of Trustees

Officers: Marilyn Calciano – *President*. Freny Cooper – *Vice President*. David Doolin – *Treasurer*. Julie Haff – *Secretary*.

Emily Buchbinder, Liliana Diaz, Larry Donatoni, Judy Franich, Janet Heien, Fred Keeley, Carlos Palacios, Tonée Picard, Rogelio Ponce Jr., Kirk Schmidt, Sandy Skees, Trevor Strudley and Jim Weisenstein.

Learn more about how we turn generosity into community benefits at cfsc.org, contact us at 831.662.2000 or visit us in person, 7807 Soquel Drive, Aptos, CA 95003

Tax-ID: 94-2808039

S COMMUNITY FOUNDATION
SANTA CRUZ COUNTY



**Give to your passions.
Support effective nonprofits.
Create lasting impact.**



COMMUNITY FOUNDATION
SANTA CRUZ COUNTY



“Hello”

AS WE ENTER OUR 37TH YEAR THE COMMUNITY FOUNDATION HAS EVOLVED FROM OUR MODEST BEGINNINGS TO BECOME A CENTER FOR SOLUTIONS ACROSS SANTA CRUZ COUNTY. WITH ALMOST \$130 MILLION IN TOTAL ASSETS, WE HAVE THE RESOURCES TO HELP CHARITABLE VISIONS GET ESTABLISHED AND GROW, IMPROVE THE EFFECTIVENESS OF THE MORE THAN 500 LOCAL NONPROFITS WE SERVE, AND CONTINUE TO BUILD ON OUR \$90 MILLION IN GRANTMAKING EFFORTS.

Susan True, CEO

Grants Fuel Impact Countywide

Borina Special Places Fund supports historic, youth, and senior facilities. Because of the generosity of the Borina family, in 2019 we will award close to \$400,000 for capital projects that give youth places to develop; seniors places to gather and to preserve the unique history of the county.



The Borina family strawberry brand label

Flexible grants reward effective nonprofits. In 2018, we created a new, simple and easy grant process to help nonprofits keep their focus on mission – not paperwork. This year we were also pleased to provide over \$700,000 in flexible support for ongoing operations to our county’s essential service providers.

Collaborative funding approach benefits the arts ecosystem. To help our arts organizations create art for audiences across the county, we partnered with

the Arts Council to make a single application and award process. Together, we have successfully funded almost \$500,000 dollars in needed resources for our vibrant arts community.

Our Loans Make It Possible

Our Community Investment Revolving Fund provides local low interest loans to the tune of \$3.2 million to six local projects. These funds are already at work creating housing, growing income, and expanding sustainable agriculture. For example, Homeless Services Center is building 6 apartments for people transitioning out of temporary shelter.



New Habitat homeowners in Live Oak

Habitat for Humanity is adding 11 new affordable homes in Live Oak. FarmLink is helping farmers expand their sustainable agriculture businesses. Landed has helped 18 teachers buy their first homes.

Donors are invited to co-invest in our Community Investment Revolving Loan Fund to put local capital at work for local solutions.



Students of arts grantee-partner El Sistema

By the Numbers

Inspiring: \$90 million in local grants since 1982

Record breaking: \$11.7 million awarded in 2018

Prudent: 8.3% average 10 year rate of return

Trusted: \$128 million in assets at year end 2018

Forward thinking: 250 Endowed Funds

Efficient: Operating budget is 2% of total assets

Why Us?

WE ASKED OUR MEMBERS WHY THEY TURNED TO THE FOUNDATION FOR HELP WITH THEIR PHILANTHROPY. HERE ARE SOME OF THE THINGS THEY SAID:

Tax-Wise Giving Ideas. “We sold our company but wanted to maintain our 100 year-old presence in the community. Our donor-advised fund provides charitable and tax advantages, and makes it easy to continue our family tradition of giving back.”

*Tom Wilson,
Geo. H. Wilson, Inc.*

Donor-advised Fund Ease and Expertise. “Community Foundation was an amazing asset for us. They made it easy to give back by turning appreciated stock into donations that support our community.”

*Ben and Marta Strock,
Strock Family Fund*

Community Solutions. “They have the ability to step in and bring people together to create lasting solutions to our county’s big issues. ”

*Martina O’Sullivan,
Honorary Trustee*



Emily Buchbinder, Liliana Diaz, Willy Elliott-McCrea

Professional Advisor Assistance. “The Community Foundation is a wonderful resource for professional advisors. I have confidence in the Foundation and their team’s ability to help my clients with gifts from wills and trusts.”

*Emily Buchbinder,
Estate Planning Attorney*

Nonprofit Fund Stewardship. “Our all-volunteer coaching staff shows how much soccer is a part of the Pajaro Valley. We knew the Foundation would invest the money we’ve received for fields wisely.”

*Liliana Diaz,
Pajaro Valley Youth Soccer*



Geo. H. Wilson, Ben & Marta Strock, Martina O’Sullivan

Support for Nonprofits. “The Foundation’s grant helps us feed 55,000 Santa Cruz County residents every month. We also trust the Foundation to invest our endowment to ensure our financial health.”

*Willy Elliott-McCrea,
Second Harvest Food Bank*

“OUR VISION IS TO MAKE SANTA CRUZ COUNTY THRIVE FOR ALL WHO CALL IT HOME, NOW AND IN THE FUTURE. OUR MISSION IS TO BRING TOGETHER PEOPLE, IDEAS, AND RESOURCES TO INSPIRE PHILANTHROPY AND ACCOMPLISH GREAT THINGS.”



CALL SAM LEASK, DIRECTOR,
PHILANTHROPIC SERVICES AT
831.662.2060 TO LEARN MORE